

Date: July 7, 2015

To: Thomas J. Bonfield, City Manager
Through: Keith Chadwell, Deputy City Manager
From: Mark D. Ahrendsen, Transportation Director
Subject: GoDurham 2015 On-Board Passenger Survey

Executive Summary

GoDurham and GoTriangle engaged CJI Research in 2015 to conduct an onboard survey of riders of GoDurham buses, with a supplementary survey of riders of the Bull City Connector (BCC). The purpose of the study was to provide support for GoTriangle, which is responsible for the planning and marketing for GoDurham. The survey was conducted in English and Spanish.

The survey process is critical to understanding who GoDurham's customers are (demographics), how they use the system, and how they rate the quality and effectiveness of the services provided. Furthermore, customer surveys represent a key component of GoDurham's ongoing outreach process.

Compared to the previous survey in 2011, the percentage of 2015 riders rating the overall service 6 or 7 on a 7-point scale (where 7 means "excellent") increased by 4% from 43% in 2011 to 47% in 2015. Nearly all customer satisfaction ratings showed improvements, with the largest improvements including frequency of service, ease of connections between GoDurham and other regional/local buses, accuracy of 485-RIDE customer service lines, buses running on time, and connections between GoDurham buses.

Recommendation

Receive a presentation on the results of the 2015 GoDurham On-Board Passenger Survey.

Background

A previous survey of GoDurham and the BCC was conducted in 2011. The 2015 survey is intended to provide updated information on aspects of the 2011 survey, but more importantly, to provide new information on customer satisfaction, customer priorities for service improvements, communications, other matters, and to help gauge the direction of the overall system.

Onboard surveys were conducted on GoDurham buses from March 21 through March 29, 2015. Separate questionnaires and samples were used for the BCC route and the basic

GoDurham routes. Because the questionnaires were significantly different, the results presented in his report treat the two surveys separately.

Issues and Analysis

A total of 9,073 GoDurham and BCC riders boarded and were approached during the surveyed trips. They were asked to participate in the survey. Of those boarding:

- 3,393 said they had already completed a survey.
- 2,180 were unwilling to participate
- 271 appeared to be younger than 16 and were not approached.
- 141 spoke a language other than English or Spanish.
- 3,406 accepted questionnaires, while 235 accepted the questionnaire but did not return it
- 3,171 turned in a questionnaire, which amounts to:
 - 93% of those accepting a questionnaire
 - 55% of those who had not already completed a survey
 - 35% of all those boarding.

Many of the findings in this report have to do with changes between the previous passenger survey of 2011 and the current 2015 survey. The reader should be aware that important changes to the GoDurham system have occurred since the 2011 survey. They include improved frequency and hours of service on several routes and a major improvement in the on-time performance of the routes, from 62% on-time in 2011 to 84% on-time in 2015. These changes are the result of a comprehensive review of the GoDurham system during 2011 and 2012 and new revenues through the Durham County Bus and Rail Investment Plan.

GoDurham - Key Findings

Perception of Major Service Improvements

- The satisfaction score for GoDurham service overall increased, with 47% rating it as excellent or very good (7 or 6 on a 7 point scale), up from 43% in 2011.
- The major changes driving this increase were in:
 - Frequency of service, which rose by fourteen percentage points from 29% to 43%.
 - Connections with other local systems which rose thirteen percentage points from 36% to 49%.
 - On-time performance went up nine percentage points from 33% to 42%.
 - In addition, the rating of accuracy of information from the 485-RIDE information staff rose by twelve percentage points from 43% to 55%.
- Because on-time performance is among the most difficult operational aspects to control, and because it is among the most important elements of service to riders, it can be regarded as a keystone item that is important to other aspects such as making connections and perceived overall speed of service. To illustrate the importance of on-time performance and in spite of the fact that collectively riders see a major improvement in on-time performance, it still remains the top priority for further improvement.

- Once again as in 2011, the aspect of service with the lowest satisfaction score is for behavior of other people on the bus. Only 26% giving top ratings on this item.
 - When asked to rank areas for improvement, "buses running on time" was by far the most frequently cited aspect of service to improve. It was cited by 57% of riders as first, second, or third most important among fourteen specific aspects of service to improve. It was mentioned almost twice as often as the next two aspects of service that were cited as important to improve: the time GoDurham buses stop running in the evening (33%) and frequency of service (31%).
- Trip purpose is primarily oriented to employment and school
 - GoDurham is providing local labor force mobility. In the past month, 70% have taken GoDurham to get to and/or from work, up from 65% in 2011.
 - Many other riders in the past month have used GoDurham to get to and/or from middle or high school (14%) or college (20%). Thus GoDurham is serving the large educational institutions in the community as well as the needs of the students themselves.
- Demographics
 - GoDurham provides a key support for employment and education. Of all GoDurham riders, 49% are employed outside the home and another 27% are students who are also employed for a total of 76% of riders being employed. In addition, another 13% are students who are not also employed.
 - There was relatively little demographic change within the ridership with one exception: The percent who consider themselves Hispanic, while it remains small, has doubled from 5% to 10%.
 - Seventy percent (70%) of GoDurham riders identify themselves as African-American (down from 78% in 2011). Of others, 13% identify themselves as "white" (up from 11% in 2011).
 - Like most bus systems, the ridership of GoDurham is young, with 53% under the age of 35.
 - Similar to the ridership of many bus systems, 50% of GoDurham riders' households report that they have household incomes of less than \$15,000. This is a smaller percentage of very low incomes than in 2011 when that percentage was 57%.
 - Riders continue to be highly transit dependent in 2015 (62%) as they were in 2011 (also 62%).
- Travel characteristics
 - Transferring, while essential in many cases, is not well liked by most riders. The percent of riders saying they must transfer in their trips has declined from 65% in 2011 to 58% in 2015, and satisfaction with the ease of transferring increased as noted above.

- As in 2011, more GoDurham riders travel seven days a week (56% in 2015 and 53% in 2011) than follow any other pattern.
- When GoDurham riders transfer between systems in the region, they transfer more often to or from GoTriangle (30%) than other systems. This is a decrease from 38% in 2011.
- The percent using only GoDurham or the BCC increased to a similar extent, from 45% to 55%, a change that suggests the two changes may be related.
- Like ridership of most transit systems, GoDurham's ridership has many riders who are relatively new to the system: As in 2011, 21% said that they had been using GoDurham for less than a year and another 2% indicated that the day they were surveyed was their first time using GoDurham. This is not entirely growth in ridership since ridership did not grow by 23% in the year preceding the survey. Rather it represents a combination of riders beginning to use GoDurham and others ceasing to use it.
- This level of new ridership is common in bus systems in the United States. Except in cities such as New York and Boston, using transit is a temporary life phase for many people. New riders constantly flow into a system, replacing others who cease riding. Retaining even a small portion of those new riders longer can result in substantial increases in ridership. This becomes realistic when service improvements are continually occurring as they are with the newly christened GoDurham.
- Access to GoDurham is easy.
 - More than half of GoDurham's riders (54%) take only 5 minutes or less to get to their bus stop, while another 23% take between 5 and 10 minutes, for a total of 77% taking 10 minutes or less.
- Fare media. The use of passes is important to speeding the boarding process, and thus the on-time performance, of buses, as well as providing convenience for passengers and in many cases a discount.
 - Only 15% of GoDurham riders use cash fares, approximately the same as the 17% using cash in 2011.
 - Most GoDurham riders (85%) use a pass of some type, most often a day pass (47%).
 - The GoPass is used by 13%, and increase from 3% in 2011.
- Communication. Transit systems are experiencing a transition from the use of printed materials to communicate to electronic and increasingly mobile electronic modes.
 - TransLōc, introduced at GoDurham only in December 2011, already is the choice of 17% of GoDurham riders for communicating about service changes or disruptions.
 - 73% of GoDurham riders now use not just a cellphone, but a smartphone on which they access the Internet and can use apps like TransLōc. .

- Mobile communication also appears to be building the use of 485-RIDE. It was the choice of 22% in 2011, but 35% in 2015.

Bull City Connector – Key Findings

A separate survey of BCC riders was conducted simultaneously with the GoDurham survey. The service is sufficiently different that separate questionnaires had to be used. The BCC survey includes 219 respondents, and has a sample error of +/-6.6% at the 95% level of confidence.

- Duke affiliation: 59% of BCC riders have some type of affiliation with Duke. This includes:
 - 16% employees or contractors
 - 14% students
 - 16% patients at the medical center
 - 10% visitors
 - 3% "Other"
- Like users of the GoDurham system, BCC riders use the service primarily to get to work (47%) or school (20%).
- The employment profile of BCC riders has changed very little since 2011.
 - The extent of employment outside the home among BCC riders has remained generally unchanged since 2011. However, the percent of employed students increased from 13% to 18% offsetting a decrease in the percent of riders (from 44% to 41%) who are employed non-students, for a total employment level of 59% compared to 57% in 2011.
 - Another 17% of BCC riders are students who are not also employed, up from 14% in the previous survey.
- Other demographics
 - Collectively, BCC riders in 2015 are slightly older than the ridership was in 2011. For example, while 48% were under 35 in 2011, 41% are under 35 in 2015.
 - BCC riders with incomes of \$75,000 or more increased from 7% to 12% in parallel with a similar change among all GoDurham riders. However, the percent of riders indicating incomes below \$15,000 also appears to have increased slightly, from 49% to 52%.
 - The ethnic group make-up of the ridership is essentially unchanged.
- Travel characteristics
 - More than one-fourth of BCC riders (26%) say have been using BCC daily for the past year. Another 40% say they have used it a few times a week.
 - Of all BCC riders:
 - 73% also use GoDurham. Only 27% use BCC only.
 - 42% use GoDurham four or more days per week.
 - 31% use GoDurham seven days per week
- Customer satisfaction

- Although the percent giving top score of 7 on the 7 point satisfaction scale declined from 54% in 2011 when the service was very new to 48% in 2015, the percent giving the top two scores (6, or 7) combined increased from 75% to 82%.
 - As with GoDurham service in general the percent rating on-time performance as "excellent" increased substantially, from 34% in 2011 to 48% in 2015.
 - Other satisfaction changes did not parallel GoDurham. The percent rating as excellent the connections between BCC and other GoDurham buses and other local bus systems declined substantially (from 56% to 47% and from 57% to 45% respectively).
 - Other declines include the time buses stop running in the evening (46% to 36%), behavior of others on the bus (from 38% to 26%) and, the distance to the nearest BCC bus stop (from 56% to 46%).
 - These kinds of distinct negative changes are unusual. They tend to occur either when service is really deteriorating, or when the service for whatever reason has begun to attract ridership with somewhat higher employment and income levels, and who are less transit dependent, and more ready to complain. Those demographic changes are reflected to some extent in the survey results. Whether they are sufficient to explain the changed satisfaction results cannot be determined from the survey.
- While a majority (56%) of BCC riders use a smartphone, their utilization is lower than it is for GoDurham riders (73%). This probably has to do with the fact that the BCC riders are somewhat older.
 - Like their GoDurham counterparts, BCC riders are moving away from printed materials and to electronic sources of transit information. In spite of the fact that they are less likely than GoDurham riders to use a smartphone, they are more likely (24% to 17%) to say they prefer information from the TransLōc app.

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Attachments

PowerPoint